

# HOW TO DRILL INTO DATA IN THE PIVOT SECTION

- Drilling only works in the pivot section.
- You can only drill data that is included the results section of the report. If the data is not available in the results, you will need to modify the query section to bring in the data you want.
- Remember Summary level reports will only narrow the data by BOC, detailed information must come from the detail reports.

## Step 1:

**BrioQuery - 34dtr[1]**

File Edit View Insert Format Pivot Tools Window Help

Times New Roman

**Pivot** Sort Outliner

Sections: DTR, Query, Results, Pivot

Sort: Fiscal Year by Label using Sum

Fiscal Year	Begin Budget Fy	Undelivered Orders	Expended Items
2005	2001	-16,571.07	0
	2003	0.00	0
	2004	-865,620.35	504,490.31
	2005	76,087.09	145,428.35
<b>Total</b>		-806,104.33	649,918.66

Side Labels: Fiscal Year + Begin Budget Fy

Top Labels: Reporting Org 1

Facts: Undelivered Orders + Expended Items

Ready | Sorting Complete | 2x5

1. Create a pivot based off a report you have processed. In this example, the DTR was used.

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## Step 2:

The screenshot shows the BrioQuery application window titled 'BrioQuery - 34dtr[1]'. The interface includes a menu bar (File, Edit, View, Insert, Format, Pivot, Tools, Window, Help), a toolbar, and a 'Pivot' section on the left. The main area displays a pivot table with the following data:

Fiscal Year	Begin Budget	Undelivered Orders	Expended Items
2005	2001	-16,571.07	0
	2003	0.00	0
	2004	-865,620.35	504,490.31
	2005	76,087.09	145,428.35
Total		-806,104.33	649,918.66

The 'Begin Budget' column is highlighted, and the '2005' value is selected. The status bar at the bottom indicates 'Sorting Complete' and '2x5'.

2. Make sure you are in a pivot then **<click>** on a field that you want to drill into, in this example it is BFY 2005 and then **right <click>**.

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### Step 3:

The screenshot shows the BrioQuery - 34dtr[1] application window. The Pivot table is sorted by 'Begin Budget FY' and shows data for the years 2001 through 2005. A context menu is open over the 'Total' row, with options including 'Drill Anywhere', 'Drillup', 'Add Computed Item...', 'Focus on Items', 'Hide Items', 'Font...', 'Style...', 'Justify', 'Data Labels', 'Corner Labels', and 'Use Surface Values'. The 'Drill Anywhere' option is highlighted.

Fiscal Year	Begin Budget FY	Undelivered Orders	Expended Items
2005	2001	-16,571.07	0
2005	2003	0.00	0
2005	2004	-865,620.35	504,490.31
2005	2005	76,087.09	145,428.35
Total			

Side Labels: Fiscal Year • Begin Budget FY  
Top Labels: Reporting Org 1  
Facts: Undelivered Orders • Expended Items

3. When you right <click> a menu will appear, the two fields you will be interested in is the **Drill Anywhere** and the **Drill up**. <Click> on **Drill Anywhere**.

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## Step 4:

The screenshot shows the BrioQuery application window titled "BrioQuery - 34dtr[1]". The interface includes a menu bar (File, Edit, View, Insert, Format, Pivot, Tools, Window, Help), a toolbar, and a Pivot section. The Pivot table is sorted by "Begin Budget" and shows data for Fiscal Year 2005. A context menu is open over the "2005" row, displaying options such as "Drill Anywhere", "Drillup", "Add Computed Item...", "Focus on Items", "Hide Items", "Font...", "Style", "Justify", "Data Labels", "Corner Labels", and "Use Surface Values". The Pivot table data is as follows:

Fiscal Year	Begin Budget	Undelivered Orders	Expended Items
2005	2001	-16,571.07	0
2005	2003	0.00	0
2005	2004	-865,620.35	504,490.31
2005	2005	76,087.09	145,428.35
Total			3400

The taskbar at the bottom shows the Start button and several open applications: Gretchen..., Microsoft..., Palm Des..., 2 Micros..., and BrioQuer... The system clock indicates 2:00 PM.

4. By <clicking> on any of the **fields** under **Drill Anywhere**, you can get more information in what makes up the numbers in BFY 2005. In this example we will drill down by program.

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## Step 5:

The screenshot shows the BrioQuery application window. The main area displays a pivot table with the following data:

Fiscal Year	Begin Budget Fy	Program	Undelivered Orders	Expended Items
2005	2005	523401030	16,462.00	11,042.99
		523403030	0.00	8,516.02
		523404030	430.00	8,043.64
		523405019	2,723.52	3,241.24
		523405030	44.05	11,033.32
		523406030	0.00	2,111.19
		523408030	345.00	13,908.18
		523409030	19,779.51	55,022.93
		523410030	23,325.78	48,991.42
		523411030	5,473.81	-9,030.4
		523412030	0.00	-11,457.21
		523413030	0.00	7,509.29
		523414030	0.00	1,229.13
		573409030	6,500.00	-8,247.76
		573409031	1,003.42	4,775.48
		753409030	0.00	-1,261.11
Total			76,087.09	145,428.35

The interface includes a menu bar (File, Edit, View, Insert, Format, Pivot, Tools, Window, Help), a toolbar, and a Pivot pane on the left with sections for DTR, Query, Results, and Pivot. The Pivot pane shows a tree view of fields including Reporting Org 1, Reporting Org 2, Program, Boc, Document Number, Vendor Code, Reference Info, GI Account, User Id, Financial Amount, Undelivered Orders, Expended Items, Fiscal Year, Fiscal Month, Account Type, Vendor Name, RUNDATE, and SYSTEM. The main table has a 'Sort' dropdown set to 'Program' and a 'by' dropdown set to 'Label'. The 'using' dropdown is set to 'Sum'. The status bar at the bottom indicates 'Sorting Complete' and '2x17'.

5. The data has now been split out by Program Code. Lets see what vendors make up program code 523409030. First <click> on the **program code** you want to drill into, then **right <click>** and go to **Drill Anywhere** and then **Vendor Name**.

**Step 6:**

The screenshot shows the BrioQuery interface with a pivot table. The table is filtered by Program (523409030) and Vendor Name. The table has columns: Fiscal Year, Begin Budget Fy, Program, Vendor Name, Undelivered Orders, and Expended Items. The data is sorted by Program and Vendor Name. Annotations include:

- "Little drill bits." pointing to the small drill bit icons in the side labels.
- "<Click> on the on the last field in side labels and **right** <click>." pointing to the right-click action on the last field in the side labels.

The side labels are: Fiscal Year, Begin Budget Fy, Program, Vendor Name. The top labels are: Reporting Org 1. The facts are: Undelivered Orders, Expended Items.

Fiscal Year	Begin Budget Fy	Program	Vendor Name	Undelivered Orders	Expended Items
2005	2005	523409030	ACCESS ABILITY, INC	19,779.51	2,520.49
			BANK OF AMERICA	0.00	2,098.66
			BARBARA J KNOTZ 3410	0.00	8,165.85
			DEBORAH J REDPATH 3410	0.00	9,856.83
			FEDERAL EXPRESS CORP	0.00	745.92
			JORGEANA K WILLIAMS 3410	0.00	0
			JULIE K TRIPP 3410	0.00	0
			LAURA L SCHULTZ 3410	0.00	14,571.18
			MEGAN PHOMMAHANAY 3410	0.00	11,279.15
			PAULA M DAUGARD 3410	0.00	-194.72
			SHEILA HENSLEY 3410	0.00	211.92
			WAYNE E SIMON 3410	0.00	5,767.65
			<b>Total</b>	19,779.51	55,022.93

6. The pivot now shows just the one program code, 523409030, and the vendor names that were paid. You can continue drilling down using the above steps or if you are done, you can drill back up.
  - The side labels will show tiny drill bits, this lets you know the data has been drilled into. **<Click>** on the last item in the side label which will not have a drill bit in front of it and then **right<click>** to drill back up to a previous level.

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## Step 7:

The screenshot shows the BrioQuery application window titled "BrioQuery - 34dtr[1]". The interface includes a menu bar (File, Edit, View, Insert, Format, Pivot, Tools, Window, Help), a toolbar, and a "Pivot" section on the left. The main area displays a Pivot table with the following data:

Fiscal Year	Begin Budget Fy	Program	Vendor Name	Undelivered Orders	Expended Items
2005	2005	523409030	ACCESS ABILITY, INC	19,779.51	2,520.49
			BANK OF AMERICA	0.00	2,098.66
			BARBARA J KNOTZ 3410	0.00	8,165.85
			DEBORAH J REDPATH 3410	0.00	9,856.83
			FEDERAL EXPRESS CORP	0.00	745.92
			JORGEANA K WILLIAMS 3410	0.00	0
			JULIE K TRIPP 3410	0.00	0
			LAURA L SCHULTZ 3410	0.00	14,571.18
			MEGAN PHOMMAHANAY 3410	0.00	11,279.15
			PAULA M DAUGARD 3410	0.00	-194.72
			SHEILA HENSLEY 3410	0.00	211.92
			WAYNE E SIMON 3410	0.00	5,767.65
Total				19,779.51	55,022.93

A context menu is open over the "Drill Up" option, with a callout box pointing to it that says "<Click> on the Drill Up." The menu options are "Remove" and "Drill Up". The "Side Labels" bar at the bottom shows: "Fiscal Year • Begin Budget Fy • Program • Vendor Name". The "Labels" bar shows: "Reporting Org 1". The "Expended Items" bar shows: "Undelivered Orders • Expended Items". The status bar at the bottom indicates "Sorting Complete" and "2x13".

7. A small menu is now available, <click> the **Drill up** option.

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## Step 8:

The screenshot shows the BrioQuery interface with a pivot table. A callout box points to a gray bar above the 'Program' column, containing the text: "<Click> on gray bar and then right <click>."

Fiscal Year	Begin Budget Fy	Program	Undelivered Orders	Expended Items
2005	2005	523401030	16,462.00	11,042.99
		523403030	0.00	8,516.02
		523404030	430.00	8,043.64
		523405019	2,723.52	3,241.24
		523405030	44.05	11,033.32
		523406030	0.00	2,111.19
		523408030	345.00	13,908.18
		523409030	19,779.51	55,022.93
		523410030	23,325.78	48,991.42
		523411030	5,473.81	-9,030.4
		523412030	0.00	-11,457.21
		523413030	0.00	7,509.29
		523414030	0.00	1,229.13
		573409030	6,500.00	-8,247.76
		573409031	1,003.42	4,775.48
		753409030	0.00	-1,261.11
Total			76,087.09	145,428.35

Side Labels: Fiscal Year • Begin Budget Fy • Program  
Top Labels: Reporting Org 1  
Facts: Undelivered Orders • Expended Items

8. The other way to drill up is to **<click>** on the **gray bar** above the column you drilled into. Then Right **<click>** on the **gray bar**.



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## Step 9:

The screenshot shows the BrioQuery application window titled "BrioQuery - 34dtr[1]". The interface includes a menu bar (File, Edit, View, Insert, Format, Pivot, Tools, Window, Help), a toolbar, and a Pivot table. The Pivot table is sorted by "Program" and uses "Sum" as the aggregation function. A context menu is open over the table, with the "Drillup" option selected. The table displays data for Fiscal Year 2005 and Begin Budget FY 2005, with columns for Program, Amount, and another column. The bottom status bar indicates "Sorting Complete" and "2x17".

Fiscal Year	Begin Budget FY	Program	Amount	
2005	2005	523411030	-5,473.81	-9,030.4
		523412030	0.00	-11,457.21
		523413030	0.00	7,509.29
		523414030	0.00	1,229.13
		573409030	6,500.00	-8,247.76
		573409031	1,003.42	4,775.48
		753409030	0.00	-1,261.11
Total			76,087.09	145,428.35

Side Labels: Fiscal Year • Begin Budget FY • Program  
Top Labels: Reporting Org 1  
Facts: Undelivered Orders • Expended Items

9. <Click> on Drillup.

### Step 10:

**BrioQuery - 34dtr[1]**

File Edit View Insert Format Pivot Tools Window Help

Times New Roman 9

Pivot

Sort Reporting Org 1 by Label using Sum

Fiscal Year	Begin Budget Fy	Undelivered Orders	Expended Items
2005	2001	-16,571.07	0
	2003	0.00	0
	2004	-865,620.35	504,490.31
	2005	76,087.09	145,428.35
Total		-806,104.33	649,918.66

Side Labels: Fiscal Year • Begin Budget Fy

Top Labels: Reporting Org 1

Facts: Undelivered Orders • Expended Items

Sorting Complete 2x5

10. The pivot is back to the original format. You can now drill back down into the data using the same or different information.